Financial strength, for what matters.™

elementsCPA

TAX APPOINTMENT – *Day:* _______ *Date:* _______ *Time:* _______ *With:*_______

Welcome to 2017! We hope it's off to a good start – I always like to look at a new year as being open to possibilities, and to approach with fresh eyes and energy.

Of course, another part of kicking off the new year, is getting taxes out of the way – the pointers below will help make it a smooth process, and don't hesitate to contact us if you have any questions.

- New deadline dates: There's new tax deadlines this year for *Partnerships* and *C-Corporations: Partnerships* (Form 1065) now have deadline of Mar 15 (used to be Apr 15), and *C-Corporations* (Form 1120) now have a deadline of Apr 15 (used to be Mar 15). (*S-Corporations* keep their same deadline of Mar 15, and *Exempt Organizations* May 15.)

- Be prepared: Enclosed is the *Pre-Appointment Checklist* – be sure to scan through both before your tax interview to be sure you have everything, and to note any questions you want to ask.

- Choose your Value Pak: If you haven't already chosen your Value Pak for this year, be sure to check your e-Cabinet before your appointment, so you'll be ready to select your choice (http://e-cpa.com/2h0Ji0N)

- Appointment day: Don't forget to add the above appointment to your calendar, and give Sharnice a call if you need a different date/time.

- Cut-off dates: For *Partnerships* and *S-Corporations*, we'll need the last piece of information and complete your tax interview before Feb 28, to ensure your return will be ready by Mar 15. For *C-Corporations*, we'll need both by Mar 31 to ensure completion by Apr 15. And for *Exempt Organizations*, we'll need both by Apr 30 to meet the May 15 deadline. (For some returns, we may employ a tax extension strategy as part of your broader tax plan.)

- Extensions: Active or Support level members will automatically have extensions filed for you if needed. And if you've chosen a different Value Pak level, simply complete the Change Request form on our website by midnight before the due date, and we'll take care of it for you.

An enhancement we're making for members at all levels this year, is the addition of a "Your Uploads" folder in your e-Cabinet – you can use this folder during tax season to save tax documents whenever they arrive. Once all is ready, just send us a note, and we'll retrieve and place in your file for your tax interview. You can also use this folder all year long to save tax notices, financial files, or other documents you want to give us, so it's always ready for when the time comes.

Virginia, Sharnice, and myself look forward to helping you file your tax returns as smoothly as possible this year, and don't hesitate to reach out to us with any questions – we're here to help!

Sincerely,
Adrian G. Simmons
& the Elements CPA team